

Report to the Commissioners

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December 15, 2020

On the last page are two tables, one for performance measures and one for workload indicators, showing:

FY 2019 actuals

FY 2020 annual targets

FY 2020 actuals

FY 2020 actuals as a percentage of annual targets

FY 2020 actuals as a percentage of FY 2019 actuals

FY 2021 actuals to date

FY 2021 annual targets

FY 2021 actuals as a percentage of FY 2021 annual targets

The general target is 41.66% for FY 2021 to date, July 1-November 30, 2020, keeping in mind that some numbers will be unevenly distributed throughout the year, some will lag 30-90 days due to subcontractor billing/reporting and some will change during the end of the fiscal year reconciliation process. Additionally, all clients are counted as “new” in July, which results in total client numbers being substantially above the annual target at the beginning of each fiscal year. This effect diminishes as the year progresses. Some information is not yet available and will be reported in future months. Additional detail may be reported in the program sections below. Numbers highlighted in yellow have been revised since the last report.

Data to note:

■ Nutrition

- Although the dining rooms at all sites remain closed, we continue to record “congregate” clients and meals each month as the meals provided to Meals on Wheels volunteers are considered congregate meals.
- The continuing impact of COVID can be seen in both the number of Meals on Wheels clients and the number of meals served. We have 497 MOW clients so far this fiscal year, up from 331 this same time last year. Total meals served at this time last year were 34,855 compared to 39,969 this year, an 15% increase. Meals this November were on par with meals last November, but there was an extra holiday, election day, which is not an annual occurrence. We continue to be on track to serve almost 100,000 meals this year at the current rate of demand (compared to what has been a fairly steady average of about 80,000 meals in recent years). Some clients may go off home-delivered service as COVID concerns ease, but many meet the normal criteria for the program and may continue indefinitely.

■ Transportation

- Rides continue to be down approximately 53% on all routes/services due to COVID generally (especially with the ongoing rise in cases in our area) and the suspension of fixed routes in Kalispell, the Tri-City Commuter and Columbia Falls service at the end of September as a result of COVID-related staffing shortages. While staffing levels have

recovered, we have shifted resources to a General Public On Demand service in Kalispell, which, unlike fixed route service, is easily scalable in response to COVID concerns.

- We are working to rebuild ridership after transitioning from fixed routes to the General Public On Demand service. As with any major change in transit, it can take a while for passengers to learn and adjust to a new system. Below is information related to On Demand ridership since implementation in late September:
 - Average daily On Demand rides increased from 75 at the end of September to 121 in October to 140 in November (an 87% increase overall and a 16% increase in the last month).
 - The highest single day ridership in November was 191 (up 10% from 173 in October).
 - 307 unduplicated riders used the On Demand service in November, 31 of whom were new.
 - Fiscal year-to-date, 340 unduplicated riders have used our demand response service (paratransit, Premium Dial-A-Ride and On Demand). Of those, 192 are new since implementing On Demand, meaning they were not previous users of paratransit or Premium Dial-A-Ride service.
 - Staff have projected we may reach up to 250 rides per day by the end of December as public response to the change continues to be very favorable.

- **Information and Referral/Assistance**

- I&R/A contacts continue to be high and we anticipate this is likely the “new normal” given both the aging demographic in our area as well as COVID-related concerns.

- **Independent Living Services**

- The number of clients receiving Independent Living services is at 66% of the target for the fiscal year. We have moved everyone off the waiting list and are accepting new clients at this time as a result of both natural attrition and some clients again asking to have their services temporarily suspended out of fear of virus exposure given the ongoing level of high case rates in the area.
 - As mentioned in previous reports, we did not conduct an annual survey in FY 2020 but will do so this fiscal year. We typically conduct our annual surveys in March.

- **Benefits Counseling**

- The bulk of counseling sessions are completed and most savings are realized during Medicare Open Enrollment, which runs from October 15th to December 7th.
 - So far, our data indicates we have been able to offer the same or greater level of service this year as we did pre-COVID despite providing the overwhelming majority of our services by phone, online, email and mail.
 - We continue to be ahead of the FY 2020 pace for client savings by \$69,141 (21%% higher than last year at this time).
 - We have provided almost the same level of benefits counseling hours this year as last.
 - We continue to offer our Medicare 101 class via a video that can be viewed at any time on our website.

- **Ombudsman**

- Nursing homes and assisted living facilities are still mostly closed to outside visitors and some local facilities have experienced COVID outbreaks and multiple deaths related to the virus. As a consequence, Ombudsman staff continue to conduct all consults with facility staff, residents and families via phone, email or remote video conferencing. However, DPHHS has put out rules to allow for in-person visiting under certain circumstances.

- Consults are ahead of pace with much of the increase continuing to be directly related to COVID concerns.

See each section below for relevant updates on COVID Response. We are continually re-evaluating the status of all our programs. We have and will continue to consult with the Health Officer prior to making any substantive changes.

AOA Administration

Budget and Contracts

- We submitted an amendment to our DPHHS budget to Tara for review and will put it on the Commissioners' agenda shortly. The amendment includes federal funds carried over from FY 2020 as well as a small amount of additional Title III, MIPPA, FFCRA and CARES Act funds.
 - The \$459,000 in carried over federal funds includes approximately \$241,000 in FY 2020 Title III funds and \$218,000 in CARES Act funds. We can carry forward Title III funds for three years. CARES Act funds must be spent by September 2021. We expect to expend all carried over funds by their respective deadlines.
- We have received and will continue to receive additional federal funding for transit as part of the CARES Act.
 - MDT initially approved 100% reimbursement of operational expenses with CARES Act funds the last two quarters of FY 2020 with an extension through the first and second quarters of FY 2021. Recently the Department approved another extension through March 31, 2020. The funds do not require a local match and are intended to be spent prior to regular funding allocations effective January 20, 2020.
 - MDT has set aside some CARES Act funds for capital projects, also available with no match required. MDT does not have a firm date by which funds must be spent but anticipate wrapping up projects by the end of September 2021.
- Staff submit monthly financial reports to DPHHS and quarterly financial reports to MDT.

Building

- The CDC continues to recommend that older and vulnerable adults limit their interactions with others as much as possible and to take extra precautions when they do have contact. In light of this guidance and the case rate in the Flathead, we continue to keep our South Campus offices and dining room closed to the public. We are successfully providing service in other ways and are prepared to meet in person with clients when necessary.
- We are looking into a tablet-based system to allow no contact communication with those who come by in person.

HR/Staff Development

- We continue to have an open driver position at Eagle Transit.
- We have an open Aging Services Program Manager position and have engaged L.C. Staffing for recruiting services.
- We are in the process of obtaining bids on executive recruiting services for the Transportation Manager position.
- We will continue to work with HR to restructure some existing positions and request new positions related to changing needs and Older Americans Act and transit budgets.

State/Federal/Legislative Issues

- Montana Area Agencies on Aging Association (M4A) - M4A advocates for aging services funding and policies that support older Montanans.
 - M4A continues to work closely with the DPHHS State Unit on Aging (SUA) and the new State Ombudsman to resolve ongoing funding and structural issues with the federally mandated Ombudsman Program.
 - We meet as an association monthly via conference call and have a joint call with SUA every other month.
 - We are preparing for the upcoming legislative session.
 - Work is proceeding on M4A's statewide needs assessment funded by a grant from the Administration on Community Living (ACL).
 - M4A has drafted a document to offer guidance to senior centers as they consider their options relative to re-opening for activities and services amid COVID. M4A has scheduled a virtual meeting with centers from around the state on December 22nd to get feedback on the document.
- National Association of Area Agencies on Aging (n4a) – n4a advocates for funding and policies that support older Americans and enable the aging services network to meet their needs; it provides training and technical assistance to us as members
 - Current efforts are focused on securing the inclusion of Title III and other aging services funding in any future COVID relief packages as well as advocating for aging services in annual federal budgets.
 - The House budget includes expanded funding for OAA services. The Senate version holds funding flat.

AOA Advisory Council

- The Council will next meet on January 14th via Zoom.
- The Council voted in November to move from bi-monthly to quarterly meetings through FY 2021 (as is allowed by the Older Americans Act and Council by-laws) and will re-evaluate whether to resume more frequent meetings at that time.

Outreach/Education/Media/Events

Note: Transportation related outreach is noted in the Eagle Transit section below.

- 11/2/2020: KGEZ monthly interview about AOA services and aging concerns; 15,000
- 11/3/2020: distributed Medicare/Benefits CheckUp pamphlet through West Shore Food Bank; 50
- 11/4/2020: distributed AOA newsletter to Kalispell Senior Center members; 355
- 11/4/2020: Medicare brief in Whitefish Community Center newsletter; 175
- 11/18/2020: presented Medicare and AOA services info to NWMT Care Coalition; 24
- 11/18/20: Public comment re. Bigfork Community Center needs for CDBG Community Needs Assessment Hearing
- 11/18/2020: Flathead Beacon feature article, "Fighting Against Social Isolation"; 25,000
- 11/25/2020: ad in Flathead Beacon, "No One Understands Aging Like We Do"; 25,000
- November 2020: KGEZ, 48 ads per month, Benefits CheckUp
- Medicare 101 class available on AOA website; 46 views in November

Public Transportation

■ COVID:

- On 9/28/20, we suspended all fixed route city buses and paratransit in Kalispell, the Tri-City Commuter and the fixed-deviated route in Columbia Falls due to a positive COVID case on a Dial-A-Ride bus and COVID-related staffing shortages.
 - We immediately replaced fixed/paratransit service in Kalispell with a General Public On Demand system which we plan to keep in place at least for the time being as it is easily scalable in response to COVID concerns.
 - We will resume full commuter service from Kalispell to Whitefish in the next few weeks.
 - We do not have plans at this time to resume commuter service to or fixed-deviated service within Columbia Falls due to extremely low demand prior to the recent suspension, but we continue to re-evaluate as circumstances evolve.
- We are encouraging onboard distancing as long as demand allows. We required drivers and passengers to wear masks.
- Enhanced cleaning of vehicles continues.
- We continue to be fare free to mitigate the risk of transmission through money exchange and to reduce the administrative burden on staff, but we are in the process of evaluating alternatives for fare collection in conjunction with On Demand technology (see below).

■ Montana Department of Transportation (MDT) and Federal Transit Administration (FTA):

- COVID-related funds:
 - Per FTA guidance, MDT reimbursed all expenditures from January 20 – June 30 2020 with CARES Act funds at 100%. They then extended the 100% reimbursement through December 31, 2020 and recently extended again through March 31, 2021. No local match is required and no reduction is made for fare collections.
 - We can request additional payment for any operational costs above \$5,000 that support us to prevent, respond to or prepare for COVID-related concerns or conditions (including negative economic impact on the community and/or the transit system itself) now and going forward. We have worked with MDT on several projects, including vehicle and facility repairs as well as the new Mountain Climber bus wraps.
 - MDT has set aside some of the CARES Act funds for facility and other capital purchase/construction. We have been working with MDT on several projects with the purchase of area shelters as a first priority, followed by ADA updates and remodel of the existing facility and a new bus barn addition on county property just south of the existing barn (which would necessitate Commissioner approval).
 - The next step in shelter acquisition is to complete an independent business valuation, to be paid for with MDT planning grant funds. A CPA has been selected. Commissioners have approved the MDT contract and CPA engagement letter, and work began this past week.
- Financial, program and vehicle reports for the quarter ending December 3, 2020 are due to MDT at the end of January 2021.
- Annual financial and program statistics were entered into the FTA's National Transit Database (NTD) at the end of October and are awaiting review/submission by MDT.

■ Planning:

- Annual Transportation Coordination Plan/5311 Application/Capital Request (FY 2022):
 - The plan, application and related documents are due March 1, 2021.
 - We anticipate MDT will notify us about our funding allocation by mid-December.

- We have been working to solicit public and stakeholder input.
 - The TAC met on December 7th to get an update from KLJ engineering on transportation planning within the three cities and to discuss member priorities for the coming fiscal year. The Committee will meet again to wrap up their feedback and recommendations on January 7th.
 - Staff from the cities of Kalispell, Whitefish and Columbia Falls also participated in the TAC meeting as did MDT representatives.
 - An onboard survey is in process in Kalispell to assess rider interest in continued On Demand service.
 - A public survey will be released in Kalispell this coming week, also focused on On Demand service.
 - Transit staff met with City of Whitefish staff yesterday and are hoping to set up similar meetings with staff from the cities of Whitefish and Columbia Falls by mid-January.
 - We've sent letters and made calls to the private transportation providers in the area inviting them to participate in the process.
 - We continue to explore other virtual options to gain input as we do not anticipate holding in-person public meetings this year due to COVID.
- We continue to participate in the Transportation Plan updates for the cities of Kalispell, Whitefish and Columbia Falls and have met multiple times with the consultant working on these projects.
- Outreach/Education/Media/Special Events:
 - To satisfy federal regulations, daily radio ads ran on KGEZ.
 - TAC meeting notice placed in the Daily Inter Lake and Flathead Beacon as well as on the county calendar of events.
 - As part of our ongoing research into On Demand as a potential permanent replacement for fixed route service and in conjunction with our annual TCP process, we have developed both an onboard survey and a general public survey to determine passenger and other stakeholder support for the model. See above for details.
- Operations:
 - We anticipate shortly requesting Commissioner approval for transit to become its own county department, separate from AOA.
 - We are continuing to work on the following projects.
 - On Demand technology: We continue to explore new technology to better manage and support our demand response system, which we were pursuing prior to COVID but which has become increasingly critical in light of our transition from fixed route service to General Public On Demand as a result of the pandemic. Note: If we move forward with new technology, it will be able to manage any type of demand response service, including traditional paratransit, should we decide to return to that model. It would replace our current RouteMatch software.
 - As noted over the last few months, we've researched options and pricing from both Via and Uber (which recently acquired RouteMatch) and have now added a third vendor, Ecolane. We continue to participate in a series of meetings and demos with all three vendors regarding system specifics and contracting details. We have also begun to connect with other transit systems nationally that are using software from these vendors.

- We've arranged for Via and Uber to present to MDT staff this week. There are no other transit systems in Montana using either system yet, but MDT is very interested in them as possible solutions for rural transit systems like ours.
 - After conferring with Finance, we will most likely use an RFP process to select a vendor.
- Mountain Climber rebranding:
 - We've begun the wrapping process for buses/vans, and the first van was delivered on Friday. We're using two vendors to expedite the process and have scheduled most of the vehicles for wrapping between now and March 31st (excluding those that have unexpired advertising wraps as well as back-up vehicles).
 - Now that there are Mountain Climber vehicles on the road, we are moving away from references to "Eagle Transit" and are incorporating the new name and logo on our materials, in our outreach and when interacting with passengers. We expect to have a formal launch to introduce the new look to the community shortly.
 - We are working on a new website, and are introducing a new Facebook page this week.
- Seasonal commuters: Big Mountain Commercial Association (BMCA) is financially supporting us to provide a Saturday commuter from Kalispell to Whitefish mountain this winter. This is a public transportation route open to all members of the public. The service doesn't duplicate or supplant current Snow Bus service or have an adverse economic impact on the Snow Bus contractor, Rocky Mountain Transportation, nor does it compete with another private service. Service started on December 12th and will end April 10th.
 - The commuter's first run was this past Saturday and we provided 60 rides; two originated in Kalispell.
- Volunteer driver program: As noted before, we are putting this effort on hold for now, due to a combination of factors, including COVID and the potential impact on recruiting volunteers, staff capacity required to implement the On Demand system and the need to fill the manager position.
- The SPARKS after school route is operating on the same schedule as last year (prior to the schools closing due to COVID).
- Staff Development/Training:
 - We are looking to engage an executive recruiting service to hire the new manager. We have obtained three written quotes and hope to bring a recommendation to Commissioners early next week.
 - The new manager will have the opportunity to work with HR to, with Commissioner approval, restructure some positions and add permanent and temporary positions in line with our FY 2021 budget as submitted to MDT.
- Transportation Advisory Committee (TAC)
 - The TAC met on December 9th (see details above under Planning) and decided to hold an additional meeting on January 7th from 2:00-3:30 pm to continue discussion about annual priorities.
 - The TAC will review and vote on the FY 2022 Transportation Coordination Plan, 5311 application/budget and capital request on February 4, 2021 from 2:00-4:00 pm. via Zoom.

- Glacier National Park
 - GNP staff just sent us the draft of the white paper from the Volpe National Transportation Center (part of USDOT) but we haven't had a chance to review it yet.
 - We plan to meet with GNP management and the Park's national transportation fellow on January 4th to discuss what we've all learned managing transit/visitors/COVID this past year and how we might move forward in engaging Flathead stakeholders about an integrated system.

Nutrition

- COVID: All protocols reported last month continue to be in place.
- We continue to re-evaluate the status of our dining rooms on a monthly basis.
 - At this time, we have decided to remain closed for onsite dining at the South Campus due to the increased staff resources needed to manage the volume of home-delivered meals (which we anticipate would only decrease slightly if onsite dining resumed) and the continued COVID risk to diners and staff. An outbreak among staff would likely jeopardize our Meals on Wheels program, which would in turn create a substantial hardship for many of our most vulnerable clients.
 - All senior centers remain closed to onsite dining.
 - The Whitefish Community Center continues to be closed for repairs and are operating out of a local church to prepare meals for home delivery.

I & R/Assistance/Ombudsman/Independent Living Services

- COVID: All of the protocols reported last month remain in place.
- National Council on Aging Benefits Enrollment Center (BEC) grant continuation (October 1, 2020-September 30, 2021): This grant is awarded annually. We implement the grant in partnership with the Area VI Agency on Aging (Polson). Our portion of the grant award is \$27,000. The grant supports outreach and assistance to low-income Medicare beneficiaries to identify and enroll in programs that reduce their costs related to Medicare premiums, co-pays, out-of-pocket expenses, prescription drugs, home heating costs, etc.
- Medicare Open Enrollment ran from October 15th-December 7th. Despite COVID and adjusted processes, staff provided the same level of benefits counseling service as last year and increased the amount of client savings.
- Veteran Directed Care (VDC) Program:
 - On 9/26/20, along with the other three Area Agencies on Aging in Montana that are VDC providers, we met via Zoom with the Ft. Harrison staff in charge of the program. They have substantially changed the eligibility rules of the program which will make it very difficult for vets to enroll going forward. Only a handful of vets have been able to access the program statewide under the new rules, and none of them have been from Flathead County. We continue to explore our options for raising the issue further at the national level as this change appears to be exclusively a decision made by the VA in Montana.
 - The VA agreed to meet with us quarterly to discuss issue and concerns, but they canceled our December 10th meeting. We are rescheduled for January 7th.
 - We received one new referral in October.
 - We continue to have 32 vets enrolled, down from a high of 43 in February. Some vets have passed away. Others have been denied continued enrollment at their 6-month reauthorization. We are offering vets assistance with their appeals.

- Independent Living Services:
 - As previously noted we have put everyone on the waiting list onto services and are taking new client requests.
- Caregiver Support:
 - Staff have launched Trualta, our new online support platform for caregivers, with a select group of caregivers to pilot the service.
 - We continue to explore ways to provide Powerful Tools for Caregivers training virtually.
- Emergency Planning: We have begun to provide individualized emergency planning services and “Go/Stay” backpacks to older adults in the Flathead, funded through a grant from Blue Cross Blue Shield of Montana. We started with our existing clients and will branch out as we have capacity. We also plan to put the guide on our website in pdf form so people can use it independently if they wish.
- Ombudsman Program: As noted above, several care facilities are experiencing COVID outbreaks and resident deaths. The state has issued draft policies that would allow ombudsmen to visit with residents under certain circumstances following specific safety protocols. However, given the current situation in Flathead County, it is unlikely we will engage in any in-person visitation in the near future.

Senior Centers - A primary AOA focus is outreach to area Senior Centers to build relationships, extend support, and explore new opportunities for partnership.

- AOA staff are still working on the FY 2021 agreements with the Centers and expect to have them ready for Commissioner review/approval shortly.
- COVID:
 - All dining rooms remain closed for congregate meals.
 - The Kalispell Senior Center (KSC) continues to offer onsite activities, some at the South Campus and some at the Country Kitchen at the Fairgrounds (when the space is available).
 - The North Valley Senior Center is offering toenail clinics and other limited activities.
 - Neither the Whitefish Center nor the Bigfork Center are offering activities at this time.
- Bigfork Community Center:
 - The CDBG Planning Grant process is moving forward.
 - AOA submitted comment relative to the project at the annual CDBG Community Needs Assessment Public Hearing
- Whitefish Community Center is closed for repairs and using a local church to prepare meals for home delivery.



December 2020 Report: Performance Measures Tables - November 2020 stats (FY 2021)

41.66%

MEASURE	FY 2019 Actuals	FY 2020 Target	FY 2020 Actuals	FY 2020 % of Target	FY 2020 as % FY 2019	November	Total Last Report	Total/Avg. to Date	FY 2021 Target	% Target
# Receiving Independent Living Services	98	119	86	72%	88%	1	72	73	110	66%
# Receiving Meals on Wheels	401	450	554	123%	138%	40	457	497	450	110%
# Seniors Receiving Congregate Meals	1,538	1,400	1,408	101%	92%	6	148	154	1,400	11%
# Transit Demand Response Unduplicated Riders	333	335	266	79%	80%	31	309	340	335	101%
Client Savings from Benefits Counseling	N/A	\$400,000	\$623,758	156%	N/A	\$222,341	\$183,249	\$405,590	\$500,000	81%
% of IL Service Recipients at Moderate to High Risk of Institutionalization	93%	88%	87%	99%	94%	88%	88%	88%	88%	100%
Per Meal Cost of Nutrition Services	\$6.80	\$7.00	\$7.65	109%	113%	\$6.43	\$6.39	\$6.43	\$7.50	86%
% Overall Satisfaction with Nutrition Services from Annual Survey	97%	97%	100%	103%	103%	N/A	N/A	N/A	97%	N/A
% Overall Satisfaction with Independent Living Services from Annual Survey	97%	90%	moved to next FY	N/A	N/A	N/A	N/A	N/A	90%	N/A
Maximum annual number of transportation complaints	4	25	15	60%	375%	1	13	14	25	56%
WORKLOAD INDICATOR	FY 2019 Actuals	FY 2020 Target	FY 2020 Actuals	FY 2020 % of Target	FY 2020 as % FY 2019	November	Total Last Report	Total/Avg. to Date	FY 2021 Target	% Target
Nutrition						November				
Total Meals	78,515	80,000	90,538	113%	115%	7,117	32,852	39,969	80,000	50%
MOW	46,658		62,696	N/A	N/A	6,127	27,900	34,027		
Social Dining (Congregate)	31,857		27,842	N/A	N/A	990	4,952	5,942		
Nutritional Assessments Conducted	1,858	2,000	1,311	66%	71%	0	1109	1,109	1,800	62%
Transportation						November				
Total Ride Count	116,017	100,000	88,395	88%	76%	3,706	18,903	22,609	100,000	23%
Deman Response Count	26,784	30,000	20,971	70%	78%	2,692	6,828	9,520	30,000	32%
City, Commuter and Other Ride Count	89,233	70,000	67,424	96%	76%	1,014	12,075	13,089	70,000	19%
Outreach/Special Events	31	25	41	164%	132%	1	9	10	30	33%
Information and Referral/Assistance						November				
Outreach,Information, Referral Contacts	26,014	18,000	23,823	132%	92%	2,589	9,681	12,270	18,000	68%
Outreach/Education/Media Efforts	129	120	139	116%	108%	10	47	57	120	48%
Independent Living			57%			November				37%
Homemaker Hours	1,433	2,000	1,853	93%	129%	194	851	1,045	1,430	73%
Escorted Transportation Rides	886	2,174	747	34%	84%	69	221	290	1,500	19%
Respite Hours	1,793	2,857	1,757	61%	98%	114	641	755	2,142	35%
Comm. Support/Sr. Companion Hours	508	1,471	383	26%	75%	0	0	0	750	0%
Personal Care Hours	146	174	183	105%	125%	20	126	146	150	97%
Benefits Counseling						November				
Benefits Counseling Hours of Service	1,193	500	694	139%	58%	192	153	345	650	53%
Ombudsman						November				
Ombudsman consults/cases opened	1,116	1,000	1,406	141%	126%	107	490	597	1,000	60%